

Introduction, INPUT Research Methodology

Robert Goodwin
Director, Vendor Research
INPUT



Conference Objectives

- Provide 1988-1993 Information Services Industry Forecasts
 - Revenues by Delivery Mode
 - Growth Rates by Delivery Mode
 - Trends/Issues
 - Driving/Inhibiting Forces
 - Technology Impacts
 - Vendor Activities/Market Share
 - Recommendations

INPUT

NOTES:

JJ88-RG1-2a



Conference Objectives

- Present Research Findings 1988
- Focus on Special Interest Areas:
 - EDI
 - Federal Government
 - European Information Services
 - Customer Support Services
 - Systems Integration
 - Information Systems Trends
 - Telecommunications

INPUT

NOTES:

JJ88-RG1-2b

References

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Conference Objectives

- Forum for 3 Leading IS Vendors
- Opportunity for Informal Peer Discussions
- Recreation

INPUT

NOTES:

JJ88-RG1-2 C



Wednesday A.M.

Introduction

Trends for the 1990s

Market Position—Computer Intelligence

Software Products

IS Management—2000

INPUT

NOTES:

JJ88-RG1-3 A



Wednesday P.M.

Digital Equipment

Customer Service	Federal Markets	EDI
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Free Time

Cocktail Reception

Dinner Extravaganza

INPUT

NOTES:

JJ88-RG1-3 B



Thursday A.M.

Processing/Network Services Forecast

User Research Finding

Systems Integration Forecasts

Arthur Andersen

INPUT

NOTES:

JJ88-RG1-4a



Thursday P.M.

Telecommunications

European Markets	Systems Integration	User Research
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Free Time

Cocktail Reception

INPUT

NOTES:

JJ88-RG1-4 B



Friday

Turnkey Systems Forecast

Professional Services Forecast

IBM Application Systems Division

CASE Outlook

Wrap-Up, 1989 Programs

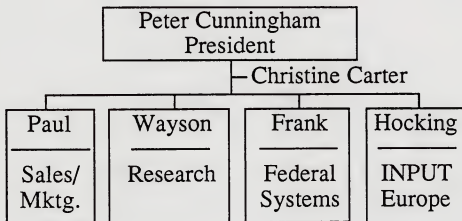
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NOTES:

JJ88-RG1-5



INPUT Organization



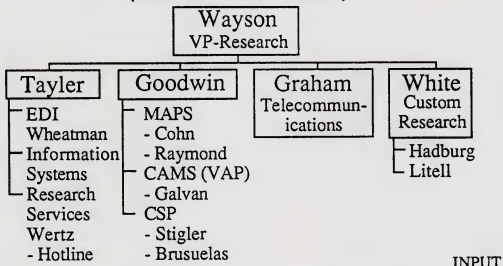
INPUT

NOTES:

JJ88-RG1-6



INPUT Research Organization (Mountain View)



NOTES:

JJ88-RG1-7



INPUT Research Washington D.C.

John Frank
Vice President

Jim Kerrigan
Federal
Government

Joanne Ponnwitz
New Jersey

INPUT

NOTES:

JJ88-RG1-8



INPUT Research Europe

Keith Hocking
Vice President

Peter Lines
Director, Research

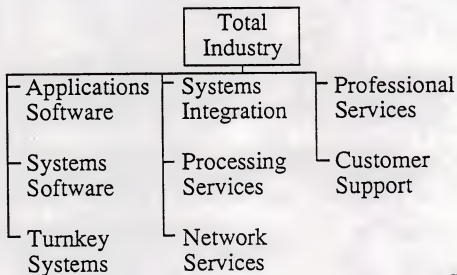
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NOTES:

JJ88-RG1-9



Information Services Industry Structure

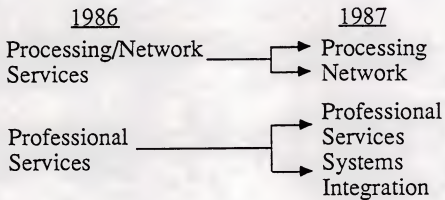


NOTES:

JJ88-RG1-10



Delivery Mode Expansion



INPUT

NOTES:

JJ88-RG1-11 A



Delivery Mode Expansion

<u>1986</u>	<u>1987</u>
Applications Software	→ Unchanged
Systems Software	→ Unchanged
Turnkey Systems	→ Unchanged

INPUT

NOTES:

JJ88-RG1-11 B



Vertical/Cross-Industry Markets

- "Office Systems" Category Added
- 6 Delivery Modes Forecast for
Each Vertical/Cross-Industry Market
- Subcategories for Selected Verticals
 - Banking
 - Commercial Banks
 - Savings/Thriffs
 - Brokerage
 - Other
 - Manufacturing
 - CAD/CAE
 - Manufacturing
Control

INPUT

NOTES:

JJ88-RG1-12a, b



Vertical/Cross-Industry Markets

Medical

- Hospitals
- Physicians/Clinics
- Other

Federal

- DoD
- Civilian

Insurance

- Life/Health
- Property/Casualty
- Agency

State & Local Government

- State
- Local

INPUT

NOTES:

JJ88-RG1-12 C,D



Research Methodology

900 Vendor
Surveys

Analysis

- 250 Largest
- Revenues: 86, 87, 88
- Growth
- Industries
- Delivery Modes
- Delivery Mode
- Industry Sector

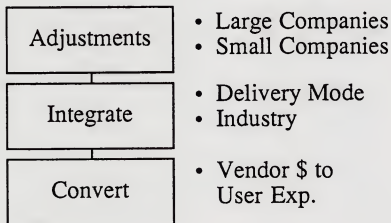
INPUT

NOTES:

JJ88-RG1-13a



Research Methodology



INPUT

NOTES:

JJ88-RG1-13b



Research Methodology

Project 5-Year
Growth

Reports

- Technology
- Economics
- Vendors
- Industry
- Driving Forces
- Inhibiting Forces

INPUT

NOTES:

JJ88-RG1-13c



All INPUT Forecasts Are for U.S.
Non-Captive User Expenditures,
in Current Period Dollars.

INPUT

NOTES:

JJ88-RG1-14



Inflation Assumptions

	'88	'89	'90	'91	'92	'93
Consumer Price Index,* Percent Change Year-to-Year	4.3	4.1	3.6	3.2	2.7	2.2

* For urban wage earners, and clerical workers

Source: President's Council of Economic Advisors, February 1988

INPUT

NOTES:

JJ88-RG1-15



Economic Growth Assumptions

	'88	'89	'90	'91	'92	'93
Real GNP Percent Change, Year-to-Year	2.9	3.1	3.5	3.4	3.3	3.2

Source: President's Council of Economic Advisors, February 1988

INPUT

NOTES:

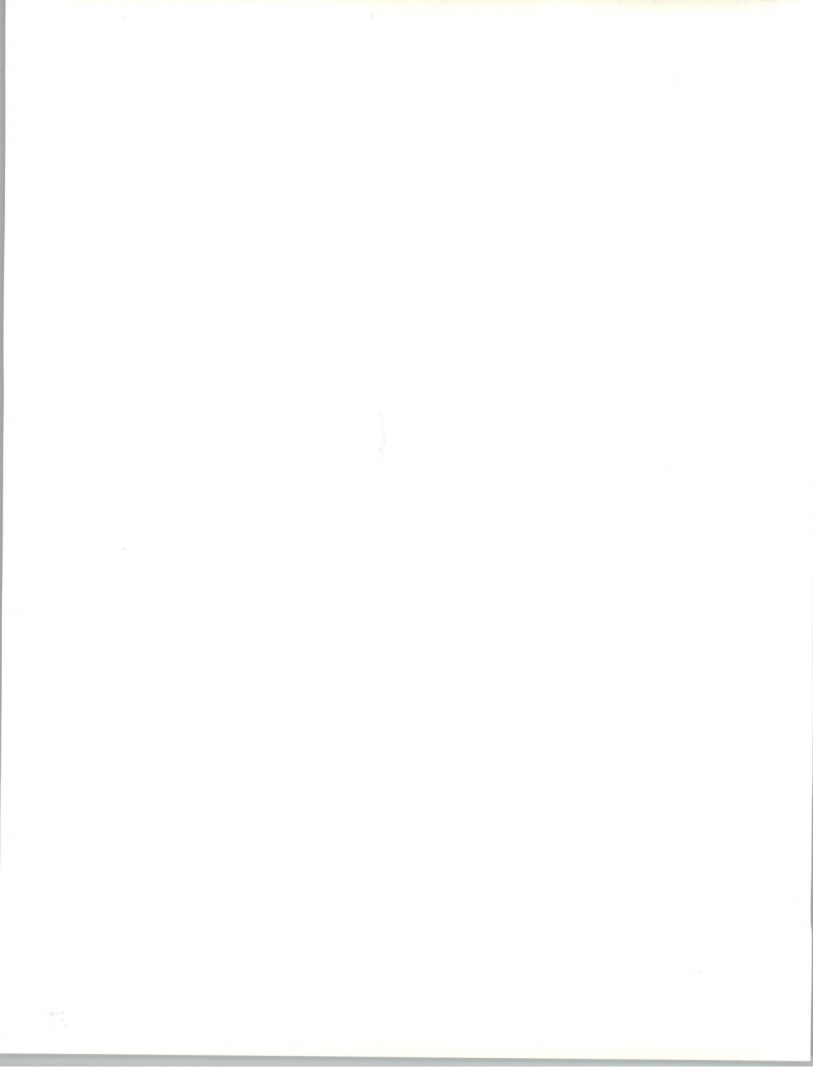
JJ88-RG1-16



Robert L. Goodwin
Director, Vendor Research
INPUT

Robert L. Goodwin directs INPUT's vendor-related research and is responsible for development and quality of all INPUT forecasting activities. He has more than 25 years of successful sales, marketing, and general management experience in the computer equipment, remote processing services, and software industries. Mr. Goodwin's expertise spans many areas of information services, including business plan development, strategic partnering, acquisitions, VAR, and reseller operations. He held senior management positions at both large and midsize corporations, including positions as President of Command Data Systems, Director of Marketing with Xerox Computer Services, and Branch Manager for IBM.

Mr. Goodwin holds a B.S. degree from Occidental College and has attended the MBA program at Golden Gate University.



①

INPUT
~~CLIENT~~
INFORMATION
SERVICES
FORUM

~~SCOTTSDALE, ARIZONA~~
~~SEPT 28-30, 1988~~

yellow
outline
yellow
text

Tenth Annual
Executive
Conference

INFORMATION—white
SYSTEMS &
SERVICES
INDUSTRY
FORUM
1988-1993

INPUT—yellow

special



Introduction
and
Input
Research
Technology →

Robert Zoderin
Director, User Research

INPUT

Company Analysis and Monitoring Service (CAMS) 1988 Directory

- ☐ New Entry
☐ Revised

Provide as much data as known. Partially complete forms are welcome.

Vendor Name: _____

Address: _____

Phone Number: _____

CEO/President: _____

Key Contact: _____

(Name)

(Title)

Total Employees: _____

Company's Primary Business: _____

Annual Revenue \$ _____

Fiscal Year Ending ____/____/____
Mo Day Yr

—or— Revenue Range:

☐ Under \$1 Million

☐ \$1-5 Million

☐ \$5-10 Million

☐ \$10-20 Million

☐ Over \$20 Million

What percent of your revenue is derived from:

U.S. _____% International _____%

What percent of your revenue is derived from information services?

_____%

What percent of information services revenue is derived from the following delivery modes:

Application Software Products _____%

Systems Software Products _____%

Processing Services _____%

Network Services _____%

Turnkey Systems _____%

Professional Services _____%

Systems Integration _____%

Total _____100%

Target Industries: _____

Type of Ownership: _____

☐ Public

☐ Private

☐ Subsidiary

☐ Division

Parent Corporation: _____

Subsidiaries: _____

Submitted by: _____

*Please put INPUT on your mailing list and send product literature.
Thank You.*

INPUT 1280 Villa Street, Mountain View, CA 94041 (415) 961-3300

Conference

OBJECTIVES

- Provide 1988-1993 information
service industry forecasts
 - revenues by delivery mode
 - growth rates " "
 - trends / driving forces / issues
 - vendor activities / market share
 - technology impact

• Present ~~strategic~~ ^{recommendations} ~~research~~ ¹⁹⁸⁵ ~~fishings~~

- Focus on specific function / market areas:

- | | |
|------------------------|----------------------------|
| - application systems | - EDI |
| - distribution systems | - Federal Government IS |
| - business systems | - European IS |
| - personal services | - Telecommunications |
| - processing services | - Customer Support |
| - retail services | - User Information Systems |

- Forum for ³ leading IS vendors
- opportunity for informal peer discussions
- Recreation

• Focus on special
interest areas:

- EOI
- Federal Government
- Europe IS
- Customer Support/Service
- Telecommunications
- IS user trade
- Information Systems Trade

WEDNESDAY		
Introduction		
Keynote: Trends for the 1990s		
Market Position		
Software Products		
IS Management		
Lunch		
Customer Service	Federal Markets	EDI
Free Time		
Cocktail Reception		
Dinner Extravaganza		

DIGITAL EQUIPMENT

ROTATE 90°

make 2 col.
or 2 slides. AM/PM.



Thursday

THURSDAY		
Continental Breakfast		
Processing/Network Services Forecasts		
User Research Findings		
SI Forecasts		
Guest Speaker (BA)		
Lunch		
Telecommunications		
European Markets	Systems Integration	User Research
Free Time		
Cocktail Reception		

— Arthur Anderson

← rotate 90°

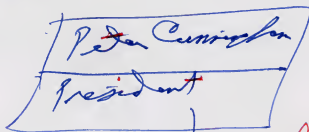


FRIDAY
47
Turnkey Systems Forecast
Professional Services Forecast
IBM Application Systems Division
CASE Outlook
Wrap-Up 1989 Programs

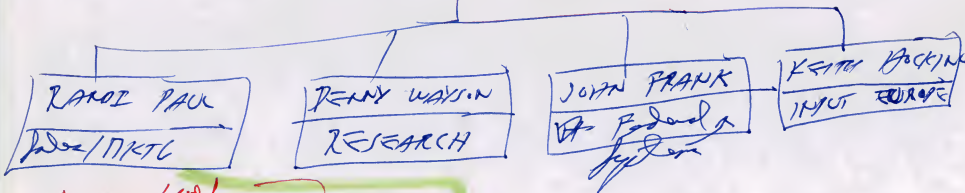


INPUT

ORGANIZATION



— Chief Clerk



- Nancy Hill
- George Hunter
- John Marshall
- James George Robinson
- Susan Fzian
- Veronica Jones

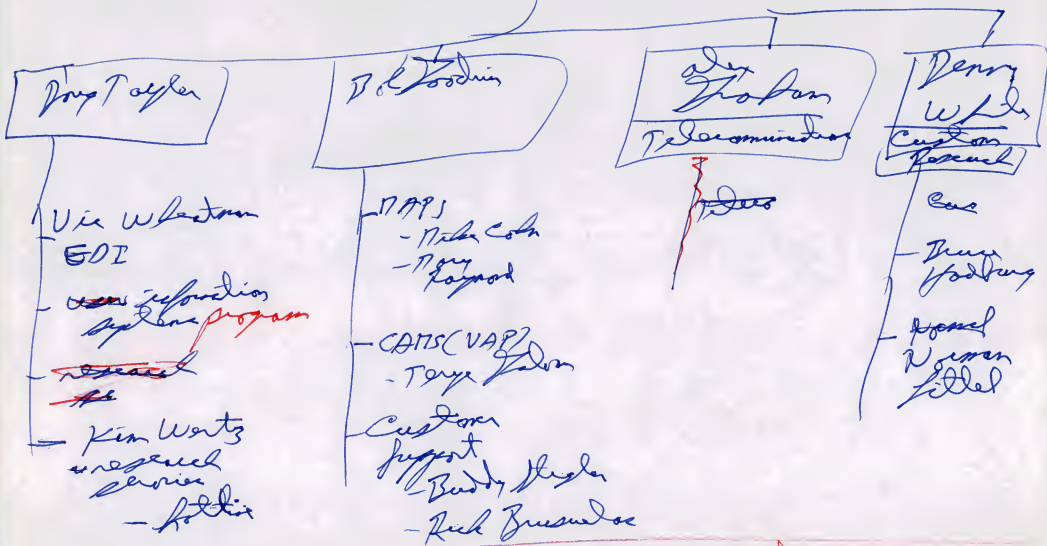
Deputy

OPTIONAL



1 K84 Research Organization (Mountain View)

Denny Woyton
VP - Research



(Order - if no room, you can delete names of people not in boxes, leave program name.)



INPUT - Workshop
Research - Washington DC

John Frank
Vice President

Jim Keegan
Federal Foreman

Joanne Ponnwitz
New Jersey



Spent Research - UK
Europe

Keith Holbing
~~David Harper~~ UK
Director VP

Peter Jones,
Director, Research
Director



Location Service Industry Structure

Total
Industry

application
software

system
software

Turnkey
systems

customer
support

processing
services

network
services

professional
services

systems
integration

as many
col. as
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Delivery Mode Expansion

Use after 7/10

1986

1986

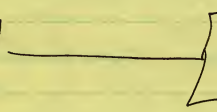
Processor/Network
servers



Processing
Network

1987

Professional
servers



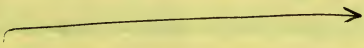
Professional
servers
System
integration

Application
software



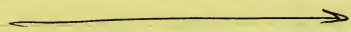
unbundled

System
software



"

Turnkey
systems



"

(New)

Vertical / cross-industry markets

1
P
10

- "office systems" category added
- 7 delivery notes present for each vertical / cross-industry market

SPLIT

- Sub-categories for selected verticals

Building

- ~~Domestic~~ commercial + office
- ~~private / public~~
- ~~business~~
- ~~other~~

Transportation

- CAD / CAE
- performance control

Medical
Hospitals

- Clinicians / Clinics
- Other

Insurance

- Medical / Life / Health
- Property / Casualty
- Agency

SPLIT

Federal

- DOD
- CIA

State & Local government

- State
- Local

10

1891

Friday July 11th

Left for the lake at 8 AM

Had a picnic at the lake
and then went home

Had a very pleasant day

July 12th

Friday

Left for the lake at 8 AM

Had a picnic at the lake

and then went home

July 13th

Saturday

Left for the lake at 8 AM

Had a picnic at the lake

and then went home

July 14th

Sunday

Left for the lake at 8 AM

Had a picnic at the lake

and then went home

July 15th

Monday

Left for the lake at 8 AM

Had a picnic at the lake

and then went home

Research Methodology

900 VENDOR SURVEYS

- 25% LARGEST RETURNS
- GROWTH
- INDUSTRY
- DELIVERY DATA

ANALYSIS

- DELIVERY MODE
- INDUSTRY SECTOR

ADJUSTMENT FOR:

- LARGE COMPANIES
- SMALL COMPANIES

INTEGRATE

- DELIVERY MODE
- INDUSTRY

CONVERT

VENDOR TO USER EXP.

PROJECT 5-YR GROWTH

- TECHNOLOGY
- ECONOMY
- VENDORS
- INDUSTRY
- DRIVING FORCES
- INHIBITING

5-YR REPORT

B_a

B_b

B_c

Order - d
want to insert
this into the
III introduction
section - could be
overlaid.

1 Bol
used as p.
13, 13a.

non-
replies

all report forecasts are for U.S.
user expenditures, in current period dollars.

INFLATION ASSUMPTIONS

	88	<u>89</u>	90	<u>91</u>	<u>92</u>	<u>93</u>
CONSUMER						
PRICE INDEX*	4.3	4.1	3.6	3.2	2.7	2.2
% CHANGE EXPERIMENTAL YEAR						

*for urban wage earners and clerical workers

Source: President's Council of Economic Advisors
Feb. 1989

ECONOMIC GROWTH ASSUMPTIONS

	<u>88</u>	<u>89</u>	<u>90</u>	<u>91</u>	<u>92</u>	<u>93</u>
REAL						
GDP	2.9	3.1	3.5	3.4	3.3	3.2
% CHANGE, YEAR-TO-YEAR						
YEAR						

SOURCE: President's Council of Economic Advisors
Feb. 1989

Input Research ~~Philosophy~~ Procedures

- ^{research} Primary ^{research} Kistavan (Telangana)
 - 6000 in 1987
 - Users
 - vendors
- Secondary ^{research} sources in INPUT information center
- Analysis by senior managers and consultants
 - 20 years + experience in information services & systems
 - Products
- Written ^{reports} reports, and newsletters and bulletins

